

Insurance Continuing Education Advisory Council meeting - July 17, 2019

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
1050965076	6/14/2019	Allianz Life Financial Services LLC	Harnessing Stable Retirement Income-Lead With Social Security	Life	General: 1	The course addresses product knowledge of life and social insurance. Discusses Social Security in retirement, benefits, retirement income, longevity risk, income goals and stable retirement income.
2071342884	6/14/2019	CEU Institute, Inc.	Neurobehavioral Effects of Brain Injury (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses traumatic brain injury, treatments and medication, the side effects of medication, cognitive deficits, and medications to avoid following brain injury.
889271602	6/17/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 CLM Claims College - Level 3	Adjuster	General: 10	The course addresses product knowledge of property and casualty insurance. Discusses claim handling skills, cyber security, fraud, policy coverage, witness preparation, construction claims, discovery cost control, catastrophe response, loss control, depositions, pharmaceutical cost control, spoliation and management principles. The course is presented in four sessions with three to six concurrent offerings.

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1353401452	6/17/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 CLM Claims College - Level 2	Adjuster	General: 12	The course addresses product knowledge of property and casualty insurance and management. Discusses exposure and coverages, privacy, coverage issues, property and liability claims, negligent hiring, reserves, risk transfer, property valuation, commercial general liability coverage, federal motor carrier pre-trip inspections, claim costs, risk exclusions, directors and officers liability coverage, injury evaluation, occupational disease, litigation management, coverage gaps, subrogation, and property fraud.
344742800	6/19/2019	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	Ethical Guidelines for CPCUs	Ethics	Ethics: 6	NAIC Uniform submission, 6 computer-based, self study credit hours approved by Pennsylvania. Discusses ethical behavior and standards, professionalism, resolving ethical dilemmas, decision-making tools and barriers, and applying the CPCU Code of Professional Conduct.
1398548098	6/19/2019	United Insurance Educators, Inc.	UIECE Life, Viaticals & Health Insurance Ethics (Online)	Ethics	Ethics: 3	The course addresses ethics. Discusses life and viatical ethics, intent, moral responsibilities, ethical codes, and morality.
1398548098	6/19/2019	United Insurance Educators, Inc.	UIECE Life, Viaticals & Health Insurance (Online)	Viatical	General: 21	The course addresses product knowledge of life insurance. Discusses viatical settlements, brokering viatical settlements, confidentiality, policy benefits, life settlements, the secondary market, policy ownership and transfer and disclosures.
1398548098	6/19/2019	United Insurance Educators, Inc.	UIECE Life, Viaticals & Health Insurance Ethics (Self-Study)	Ethics	Ethics: 3	The course addresses ethics. Discusses life and viatical ethics, intent, moral responsibilities, ethical codes, and morality.

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1398548098	6/19/2019	United Insurance Educators, Inc.	UIECE Life, Viaticals & Health Insurance (Self-Study)	Viatical	General: 21	The course addresses product knowledge of life insurance. Discusses viatical settlements, brokering viatical settlements, confidentiality, policy benefits, life settlements, the secondary market, policy ownership and transfer and disclosures.
2786362740	6/19/2019	National Alliance for Insurance Education and Research	CSRM Administering School Risks and Insurance ETH (Classroom)	Ethics	Ethics: 1	NAIC Uniform submission, 1 classroom credit hour of ethics approved by Texas. Discusses business ethics, greed and ignorance, codes of ethics, risk management, and ethics management in the workplace.
2786362740	6/19/2019	National Alliance for Insurance Education and Research	CSRM Administering School Risks and Insurance (Classroom)	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Texas. Discusses school risk administration, school risk management programs, implementation and monitoring.
281404558	6/21/2019	Cole, Scott & Kissane, P.A.	Construction Defect Litigation	Adjuster	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Florida. Discusses Florida construction defect laws, the Florida litigation process, Florida statutes, defense of claims and available coverage in policies.

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2028691987	6/24/2019	ACUITY, a Mutual Insurance Company	AGENCY ETHICS	Ethics	Ethics: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses agency interaction with insurance carrier, grey areas, misrepresentation customer information, disagreement with underwriting, agency interaction with insured, ethical dilemmas, and two sets of case studies.
3035288473	6/24/2019	Ohio National Financial Services	The 2019 Advanced Forum	Life	General: 9	NAIC Uniform submission, 9 classroom credit hours approved by Ohio. Discusses changes to estate, retirement and business planning, small business needs, underwriting, intentionally defective grantor trusts, spousal lifetime access trusts, disability income insurance, charitable giving and two case studies.
1453406163	6/25/2019	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	CPCU 556 - Personal Financial Planning	Property & Casualty	General: 19	NAIC Uniform submission, 19 text-based correspondence credit hours approved by Pennsylvania. Discusses elements of financial planning, life insurance evaluation, annuity types and features, disability and health insurance, 529 plans and other education funding, planning for and funding retirement, estate planning, and tax planning.
2844946676	6/26/2019	United Insurance Educators, Inc.	UIECE Annuities - An Investment Tool Ethics (Self-Study)	Ethics	Ethics: 3	The course addresses ethics. Discusses ethics for annuity producers, ethical behaviors, responsibilities, suitability, ethical and unethical sales practices.

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2844946676	6/26/2019	United Insurance Educators, Inc.	UIECE Annuities - An Life Investment Tool (Self-Study)	General: 7	The course addresses product knowledge of annuities. Discusses annuity variations, annuitization, rating systems, annuity advantages and disadvantages, and variable rate versus fixed rate annuities.
3523679860	6/26/2019	Transamerica Occidental Life Insurance	Ethics	Ethics	Ethics: 2 NAIC Uniform submission, 2 classroom credit hours approved by Colorado. Discusses ethical principles, morals versus laws versus ethics, codes of ethics, and ethical concepts in practice.
4240369868	6/26/2019	United Insurance Educators, Inc.	UIECE Annuities - An Ethics Investment Tool Ethics (CBT)	Ethics: 3	The course addresses ethics. Discusses ethics for annuity producers, ethical behaviors, responsibilities, suitability, ethical and unethical sales practices.
4240369868	6/26/2019	United Insurance Educators, Inc.	UIECE Annuities - An Life Investment Tool (CBT)	General: 7	The course addresses product knowledge of annuities. Discusses annuity variations, annuitization, rating systems, annuity advantages and disadvantages, and variable rate versus fixed rate annuities.
340761916	6/27/2019	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 2AC - Casualty 010	Property & Casualty 2	General: NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses cyber liability coverage, exposures, additional coverage policies, third party liability, need assessment, common policy characteristics and claim examples.

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2141394789	6/27/2019	Prudential Annuities Life Assurance Corporation	Estate Planning in the Current Tax Environment	Life	General: 1	The course addresses product knowledge of life insurance. Discusses estate planning, gifting, lifetime gift rules, spousal life-time access trusts, and survivorship standby trusts.
3420112935	6/27/2019	John Hancock Academy (formerly Manulife Wood Logan, Inc.)	Incorporating Generational Intelligence to Enhance Estate and Retirement Planning	Life	General: 1	The course addresses product knowledge of life insurance. Discusses understanding generational investment differences, identifying varied needs and concerns, and estate planning strategies.
63359376	6/28/2019	National Association of Insurance and Financial Advisors Montana	Two Interesting Planning Topics	Life	General: 2	The course addresses product knowledge of life insurance and management. Discusses comparison of investments versus mortgage pay-down, IRAs, traditional versus Roth IRAS, contribution limits and features.
689096194	6/28/2019	Employment Relations Division, Department of Labor and Industry	Governor's Conference on Workers' Compensation 2019	Adjuster	General: 14	The course addresses product knowledge of casualty and disability insurance and management. Discusses workplace injury, utilization and treatment guidelines, workers' compensation, spinal cord stimulators, opioid issues, Medicare set-aside trusts, national workers' compensation trends, a 2019 legislative recap, workers' compensation and the gig-economy, the Montana Workers' Compensation court, and Montana workers' compensation claim trends.

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1015948912	6/28/2019	Rain and Hail Insurance Service, Inc.	CHUBB AGRIBUSINESS FARMOWNERS CRAFTSMANSHIP SM SCHOOL 2019	Property & Casualty	General: 7	The course addresses product knowledge of property and casualty insurance. Discusses farmowner's policy rates, dwellings, farm personal property, specialty production property (dairy, winery, equine), crime coverage, greenhouse, unmanned aircraft liability cannabis exclusions and orchard policies.
2146941063	6/28/2019	Hudson Insurance Company	Margin Protection-2020 and Succeeding Years	Property & Casualty	General: 2	NAIC Uniform submission, 2 web-based classroom credit hours approved by Kansas. Discusses crop margin insurance coverage, covered crops, insurability, program basics, calculating dollar amount of margin loss, premium calculation, indemnity calculation, and application form.
2146941063	6/28/2019	Hudson Insurance Company	PRF & Apiculture-2020 and Succeeding Years	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses pasture, rangeland and forage, insurable acreage, reporting, comparison with other coverages, insured colonies and crops, indemnity calculation, updated Rainfall and Vegetation Index Insurance Standards Handbook, federal acreage identification and contiguous versus non-contiguous acreage.

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3188043234	6/28/2019	Prudential Annuities Life Assurance Corporation	Spousal Protection Strategies: Providing for a Surviving Spouse in Retirement (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance. Discusses retirement planning, personal fund strategies, longevity risk, Social Security eligibility, benefit calculation, retirement healthcare costs, and retirement financial security.
3203218127	6/28/2019	UNUM Group	The Changing Landscape of Paid Family Leave	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Maine. Discusses general Family Medical Leave Act requirements, state- and employer-mandated family leave, and voluntary employer-provided paid leave programs.
2241144751	6/29/2019	Burns & Wilcox	Workers Compensation & Employers Liability Coverage-Webinar	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses workers' compensation, benefits, voluntary and involuntary markets, employer liability, policies, endorsements, National Council on Compensation Insurance and policy rates.
	7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	Health Coverage Options	Disability	General: 1	The course addresses product knowledge of disability insurance. Discusses health insurance red flags, association health plans, short term, limited duration health plans and direct primary care.
	7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	CSI Initiatives, Actions and Leadership	Disability	General: 1	The course addresses management. Discusses prescription benefit management, reinsurance impact on health insurance companies and consumers and future health insurance legislation.

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7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	2019 Legislative Session Update	MT Legislative changes	MT Legislative Changes: 1	The course addresses legislative changes to Montana insurance statutes. Discusses the 2019 legislative session, Commissioner of Securities and Insurance bills and other bills affecting insurance regulation.
7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	TechTalk: Impacts of Cybersecurity on Insurance	Property & Casualty	General: 1	The course addresses property and casualty insurance and management. Discusses cyber-risk concerns and management, and the effect of data losses on consumers and businesses.
7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	TechTalk: Ethical Considerations in a Changing World	Ethics	Ethics: 1	The course addresses ethics. Discusses the effect of artificial intelligence and machine learning on insurance practice, privacy in genetic testing, legal consideration of technology and the use of drones and autonomous vehicles.
7/1/2019	COMMISSIONER OF SECURITIES AND INSURANCE, MONTANA STATE AUDITOR	Property and Casualty Fraud - Just Don't Do it.	Ethics	Ethics: 1	The course addresses ethics. Discusses agency fraud investigation duties, similarities and differences in Securities/broker and Insurance/agents, fraud reporting obligations, the cost of fraud and case studies.
1326211969 7/1/2019	Broker Educational Sales and Training, Inc	Small Business Retirement Plans I	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses types of business structure, small business retirement plans, employer-sponsored plans, defined contribution versus defined benefit plans.

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1932008733	7/1/2019	Brighthouse Financial	The Thin Line Between Wealth and Legacy	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by North Carolina. Discusses wealth transfer strategies, annuities in retirement income, life insurance protection from investment risk, business succession planning, and long-term care planning.
956807921	7/2/2019	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 2AC1 - 011	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses homeowners insurance, business exposure coverage, policy limitations, contractual liability, and coverage for watercraft.
1132785977	7/2/2019	Raymond James Insurance Group, Inc. (formerly Planning Corporation of America)	INCOME OR ASSET ALLOCATION	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses systematic withdrawal of product value, longevity risk, set versus variable withdrawal percent, retirement risks, mitigating annuity taxation, types of annuities and long-term care annuities.
1132785977	7/2/2019	Raymond James Insurance Group, Inc. (formerly Planning Corporation of America)	ANNUITIES 6 WAYS	Life	General: 1	The course addresses product knowledge of annuities and life insurance. Discusses uses for annuities, types of annuities based on client risk tolerance, fixed versus, structure versus variable annuities, long-term care underwriting, income enhancements, and annuitization for lifetime income.

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1132785977	7/2/2019	Raymond James Insurance Group, Inc. (formerly Planning Corporation of America)	INSURANCE & ANNUITY STRATEGIES	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses portfolio and asset longevity, longevity risk, growth versus retirement portfolio goals, retirement risk, long-term care planning, taxation in retirement and retirement fund sequence use risk.
1585468648	7/2/2019	Tribble Ross	Negligent Security	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses security issues relating to a multi-tenant rental apartment building, naming and describing services and cost of litigation.
1585468648	7/2/2019	Tribble Ross	Negotiation Strategies	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses negotiator conduct, negotiation psychology, mediation, and court powers and limitations.
3231402768	7/3/2019	WebCE, Inc.	Pollution and the Trucking Industry: Risk, Regulation, & Insurance	Property & Casualty	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Texas. Discusses pollution exposures and liability in trucking, risk management, commercial auto policy exclusions, transportation pollution policy, and liability coverage.

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551974266	7/8/2019	CEU Institute, Inc.	2019 PLDF Annual Meeting - Ethics	Ethics	Ethics: 3	The course addresses ethics. Discusses social media misconduct, professional liability risks in technology use, and ethical technology benefits and pitfalls.
551974266	7/8/2019	CEU Institute, Inc.	2019 PLDF Annual Meeting	Adjuster	General: 7	The course addresses product knowledge of casualty insurance. Discusses defending malpractice and board discipline, errors and omission claim defense, employment practices liability, professional malpractice trials, emerging risks for insurance licensees and tripartite professional lines mediation.
1000694303	7/8/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC XXXIII	Property & Casualty	General: 16	NAIC Uniform submission, 16 credit hours approved by Texas. Discusses catastrophe losses, drone-related risk, liquor liability exposures and coverages, commercial general liability coverage, marine workers' compensation, and the global insurance marketplace.
89194367	7/9/2019	DF Institute, dba Kaplan Financial	Commercial Crime Coverage, 7th Edition	Property & Casualty	General: 7	NAIC Uniform submission, 7 computer-based, self study credit hours approved by Illinois. Discusses commercial crime coverage, the commercial package policy, declarations, the insuring agreement, exclusions, conditions, endorsements, and rating.

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304680120	7/9/2019	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 3AC - 012	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses time element property coverage, business income coverage, extra expense coverage, additional coverages, coverage limits, and optional coverages.
634223498	7/9/2019	DF Institute, dba Kaplan Financial	Homeowners Insurance Coverage, 3rd Edition	Property & Casualty	General: 9	NAIC Uniform submission, 9 computer-based, self study credit hours approved by Illinois. Discusses personal protection for homeowners, definitions, the Homeowners 3 policy form, coverages and exclusions, perils, conditions, the Homeowners 2 and 6 policy forms, property coverages and endorsements.
904896740	7/9/2019	Prudential Annuities Life Assurance Corporation	Strategies to Manage Market Volatility	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses managing investor risk, wealth accumulation, distribution and wealth transfer, market volatility, investment strategies, and determining the most effective financial vehicles.
1888251689	7/9/2019	America's Health Insurance Plans (formerly AAHP/HIAA)	2020 FFM Refresher	ACA/Exchange	General: 5	The course addresses product knowledge of disability insurance. Discusses the federally facilitated marketplace, changes in the federal program for 2020, review of program elements, the individual marketplace, privacy and security.
3534551890	7/9/2019	DF Institute, dba Kaplan Financial	Claim Statements, 4th Edition	Property & Casualty	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses claim handling, acquiring evidence, recording and writing statements, taking claim statements, interviewing insureds and witnesses.

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91773702	7/11/2019	CEU Institute, Inc.	Cost Drivers & Complex Claims (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of complex injuries, case manager and adjuster challenges, workforce aging, antibiotic resistant infections, matching services with disabilities and home modifications.
1886902327	7/11/2019	Insurance Business Consultants, Inc.	Insurance Claims Process	Property & Casualty	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses motor carrier insurance, pre- and post-crash considerations, types of damage and recovery, covered autos, and insureds.
1886902327	7/11/2019	Insurance Business Consultants, Inc.	Insurance Claims Process	Property & Casualty	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses motor carrier insurance, pre- and post-crash considerations, types of damage and recovery, covered autos, and insureds.
4251244780	7/11/2019	First American Title Insurance Company	eClosing, Blockchain and Innovation in Underwriting	Title	General: 1	The course addresses title insurance. Discusses digital closing, e-Closings, remote notarizing, blockchain and innovative underwriting trends.

